

Queensland's Personalised Transport Horizon

Stage Three: Monitoring and Evaluation Report

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Executive Summary

Overview

Queensland's personalised transport sector has undergone significant structural and regulatory changes in recent years as industry and government have adjusted to the emergence of ride-booking services as an alternative offering to traditional taxi and limousine services.

The Queensland Government's landmark reforms of the personalised transport industry were announced on 11 August 2016 and were delivered over three stages to provide greater choice for customers by introducing ride-booking services across the state while ensuring safety, accessibility, affordability and accountability for everyone in the industry.

The personalised transport reforms in the first two stages fundamentally changed the personalised transport framework in Queensland. Alongside legalising ride-booking services, this included an updated approach to safety for the industry whilst removing red tape, in particular relating to the regulation of customer service standards, to drive innovation in the industry. As part of these changes, the Queensland Government introduced a new Chain of Responsibility safety framework for the industry and a new risk profile for the requirement for approved security cameras in personalised transport vehicles; developed a new licensing regime that included annual licences to provide booked hire services; and removed many requirements relating to customer service to allow customer demand and competition to drive service standards.

To support existing taxi and limousine businesses to transition to the new framework, the Queensland Government delivered a \$100 million industry adjustment assistance package which included a range of financial, advisory, and incentive measures to support industry participants to adjust to the new framework.

Stage 3 of the reforms involved the ongoing monitoring and evaluation of the previous measures introduced to ensure the framework delivers the best outcomes for customers and industry. It involved the following elements:

- Developing a monitoring and evaluation framework, using data from industry, customers and held by the Department of Transport and Main Roads to measure the effectiveness of the reforms against the reform objectives
- Delivering on commitments to the former Public Works and Utilities Committee of the Queensland Parliament to undertake reviews of the following three areas of the reform:
 - o Review of driver working conditions
 - o Review of driver and passenger safety
 - o Review of new Compulsory Third Party (CTP) insurance class 26 category for booked hire vehicles
- Engagement with the personalised transport industry and customers through the Personalised Transport Industry Reference Group in 2019 and annual customer and industry surveys.

During stage 3 of the reforms, the Queensland Government has also built upon the previous stages of the personalised transport reforms and continued to deliver improvements to the framework to support customers and the industry. This has included:

- Responding to the impacts of COVID-19 on the personalised transport industry by developing and delivering a personalised transport industry fee relief package, temporary measures to assist with vehicle registration cancellation and re-registration, and additional financial assistance for the taxi and limousine industry
- Implementation of a four-year, \$21 million wheelchair accessible taxi funding program to allow the industry to continue providing vital accessible transport options for people with reduced mobility by assisting with the cost of replacing eligible wheelchair accessible taxis
- Publication of the Industry Guideline on Driver Conditions in the Personalised Transport Industry
- Publication of the Personalised Transport Required Driver Training Notice, which establishes mandatory training requirements for all taxi, limousine and booked hire drivers.

Evaluation

The personalised transport reforms have delivered significant benefits in safety, choice and flexibility, and provide a sound foundation from which to respond to the new challenges to the industry that have arisen due to COVID-19.

The **safety** of customers and industry is the foremost concern in the Government's approach to regulation of the personalised transport industry. The measures introduced during the reforms have been effective in ensuring high standards of personal and vehicle safety:

- There has been a reduction in accidents involving personalised transport services on a per service licence basis since the personalised transport reforms and customers and drivers perceive high standards of safety.
- The risk profile for security cameras in vehicles to support personal safety is supported by the available evidence and there is insufficient evidence to justify mandating security cameras in ride-booking vehicles.
- Personalised transport vehicles are safe, with improvements in the rate of defects identified during on-road compliance checks and high pass rates for vehicle inspections.
- Overall, on-road compliance checks indicate a trend of improved compliance with personalised transport security requirements, except for an increase in non-compliance with booked hire signage requirements.

Concerns within the industry about fatigue management practices have been identified and the Department of Transport and Main Roads has commenced work to investigate the issue of fatigue management in the personalised transport industry. This will establish the incidence of high-risk fatigue behaviours and consider whether further regulation of fatigue management might improve safety for drivers, passengers and the community.

The reforms aimed to provide customers with access to greater **choice and flexibility** in personalised transport services whilst ensuring that there is a sustainable and competitive industry to deliver them. They have delivered significant benefits in these areas, with more people using personalised transport and increases in the numbers of industry participants providing personalised transport services:

- Patronage on personalised transport services has increased significantly, with an estimated increase of 18% between 2015 and 2020, and customers have high levels of satisfaction with personalised transport services.
- There have been significant increases in the number of personalised transport industry participants providing a wider range of services and greater choice for customers.
- Continued investment in the delivery of accessible services has included support for the taxi industry in modernising its wheelchair accessible taxi fleet to maintain high-quality service delivery for passengers with a disability.

COVID-19 has had significant impacts on patronage within the industry. The long-term impacts and the nature of the industry's recovery remains uncertain. It may result in lasting changes within the industry and to patronage. In addition, the evaluation has also identified concerns within the taxi industry about the impact of the reforms on taxi service licence owners and on the long-term viability of taxi services pre-dating the impacts of COVID-19. The Queensland Government is committed to maintaining the benefits of increased choice and flexibility for passengers that have been generated by competition in the industry but will review the taxi licensing framework to ensure it is supporting the taxi industry's ability to compete effectively.

The new regulatory framework was designed to support **innovation and customer service**. Red tape was removed to simplify industry regulation on the basis that customer preferences and needs would dictate service standards offered as a result of increased competition. Competition has increased within the industry and the removal of customer service regulation has not led to any perceived deterioration in standards in the industry. Complaint volumes are low and survey data indicates improved perceptions of services.

What's next

The Department of Transport and Main Roads will continue to monitor the personalised transport industry and to take steps when necessary to address issues arising within the industry. It is proposed that this will include regular engagement with the personalised transport industry through a new industry reference group that will meet a minimum three times per year and will have a more focused membership that allows it to share best practice and work collaboratively with representatives from across the industry and the Department of Transport and Main Roads to identify and investigate common issues affecting the personalised transport industry.

Stage 3 of the reforms has identified opportunities to initiate reviews of a number of issues arising, and the Department for Transport and Main Roads has developed the following plan for the personalised transport industry to ensure that the personalised transport framework continues to deliver against its objectives in the long term.

Objective	Planned activities
Safety standards	<ul style="list-style-type: none"> - Undertake chain of responsibility audits to ensure compliance with key safety duties and gain further insight into any areas of non-compliance. - Complete a detailed review of the evidence relating to driver fatigue in the personalised transport industry to investigate the effectiveness of the current regulatory and operational approaches and identify whether it is necessary to impose additional regulatory requirements. - Complete a review of the Secure Rank Program to assess whether it is effectively delivering improved safety outcomes that support the delivery costs. - Review the relevance of the security camera risk framework for limousines on the basis of the insignificant number of safety incidents reported in limousines. - Investigate concerns about vehicle identification requirements by considering banning potentially misleading number plates; and engaging with industry to consider issues with displaying multiple booked hire identification signs.
Choice and flexibility	<ul style="list-style-type: none"> - Continue to work with the personalised transport industry to respond to COVID-19; - Review the taxi licensing framework to ensure it is supporting the taxi industry's ability to compete effectively within the personalised transport industry as it recovers from COVID-19. - Consider the expansion of the Taxi Subsidy Scheme to include the provision of services by personalised transport operators other than taxis.
Innovation and customer service	<ul style="list-style-type: none"> - Engage with industry stakeholders to understand current plans to transition towards lower emission vehicles.
Industry engagement	<ul style="list-style-type: none"> - Establish a new personalised transport industry reference group to share best practice and work collaboratively to consider solutions to common issues affecting the industry. - Continue to monitor attitudes to the personalised transport framework through annual industry and customer surveys.

Introduction

Emerging technologies and business models are shaping customer expectations and changing the personalised transport industry in Queensland and around the globe. Queensland customers are increasingly adaptable in their travel choices and have demonstrated their willingness to seek out new ways of getting around. We are also seeing changing generational attitudes to car ownership and ways to achieve mobility, and the emergence of mobility as a service to enable end-to-end journeys to be planned, booked and paid for by the user as a single charge or through a subscription model. A flexible personalised transport sector able to adapt to the growing population and its changing needs will play a key role in meeting Queensland's transportation needs in the future and in supporting the Department of Transport and Main Roads' purpose of creating a single, integrated transport system accessible to everyone.

In particular, over the next ten years personalised transport services will be increasingly important in complementing the public transport system by conveniently connecting people to high-quality public transport services. This is expected to be valuable to meet the flexibility and personalisation in public transport customers are increasingly seeking, particularly for the first and last mile of their journey. New models of on demand public transport services are also likely to develop to expand the coverage of the passenger transport system to areas or times of lower demand in a cost-effective way.

Until the personalised transport reforms in 2016, Queensland's personalised transport industry consisted exclusively of taxis and limousines. Through its personalised transport reforms, the Queensland Government committed to ensuring Queenslanders have access to safe, reliable and affordable personalised transport services and a sustainable industry to enable more choice for customers. By introducing a new personalised transport framework and legalising ride-booking services, Government responded to technological innovation and the emergence of ride-booking platforms and created the opportunity for new participants to enter the market. Increased competition encourages the development of new and innovative service offerings, which will continue to grow the personalised transport market into the future.

The changes to the personalised transport framework were implemented progressively in three stages and over a period of five years:

Stage 1 (September to November 2016)

Immediate reforms legalised ride-booking and provided industry with flexibility to respond to this increase in competition. These changes were introduced on 5 September 2016, however participants had until 1 November 2016 to comply with some requirements.

Stage 2 (December 2016 to January 2018)

The new framework was introduced, involving comprehensive changes to primary legislation to introduce a new licensing regime and chain of responsibility for taxi and booked hire services. The changes were passed by Parliament in 2017 and commenced in August 2017.

Stage 3 (January 2018 to 2021)

Ongoing monitoring, review and evaluation of the new framework from January 2018 to 2021 to ensure competition provided customers with greater choice and flexibility; identification of unintended consequences; and as the industry moves forward, the best approach to any further changes are adopted efficiently and effectively.

To support existing taxi and limousine businesses to transition to the new framework, the Queensland Government delivered a \$100 million industry adjustment assistance package which included a range of financial, advisory, and incentive measures to support industry participants to adjust to the new framework. All the elements of the package have been delivered:

- Industry Hardship Assistance fund
- Business Advisory Services relating to grants, counselling, mentoring and support, and to assist with business improvements and financial advocacy services
- Transitional Assistance Payments
- Fee waivers for various industry charges, including taxi and limousine licence renewal fees, Driver Authorisation renewal fees and the taxi industry security levy

- Introduction of a Lift Payment for wheelchair accessible taxi drivers to prioritise bookings for Taxi Subsidy Scheme members.

During Stage 3, the government delivered the following key activities as part of the monitoring and evaluation of the new personalised transport framework:

- Development of monitoring and evaluation framework, to assess how the reforms are meeting their objectives from the perspective of customers, industry and government
- Stakeholder engagement with the personalised transport industry through the Personalised Transport Industry Reference Group to identify priority areas for further consideration from each of the different personalised transport modes, and through customer and industry surveys and focus groups
- Delivering on Parliamentary commitments to review aspects of the industry and reforms.

The Department of Transport and Main Roads has also continued to deliver improvements to the framework and support to benefit customers and industry through stage 3:

- Responding to the impacts of COVID-19 on the personalised transport industry by developing and delivering a personalised transport industry fee relief package, temporary measures to assist with vehicle registration cancellation and re-registration, and additional financial assistance for the taxi and limousine industry
- Publication of the Industry Guideline on Driver Conditions in the Personalised Transport Industry
- Publication of the Personalised Transport Required Driver Training Notice, which establishes mandatory training requirements for all taxi, limousine and booked hire drivers
- Implementation of a four-year, \$21 million wheelchair accessible taxi funding program to allow the industry to continue providing vital accessible transport options for people with reduced mobility by assisting with the cost of replacing eligible wheelchair accessible taxis
- Provision of ongoing funding of the lift payment for drivers of wheelchair accessible taxis to prioritise services to Taxi Subsidy Scheme members who are required to travel in a wheelchair
- Development of a framework for Chain of Responsibility audits of authorised booking entities and online publication of the audit tool
- Enhancements to IT systems to deliver improved online services; a public register of taxi, limousine and booked hire service licences and booking entity authorisations; and automatic suspensions of booked hire service licences where vehicles do not meet regulatory requirements
- Repeal of the *Personalised Transport Ombudsman Act 2019* and development of a new approach to support complainants seeking resolution of issues arising in the personalised transport industry.

This report outlines the outcomes of the evaluation of the personalised transport reforms based on the application of the monitoring and evaluation framework (Tables 1-2).

Strategic Objective	Purpose	Sub-objectives	Primary Evaluation Questions
1. Strengthen safety standards for the personalised transport industry	The safety of customers and drivers has always been a top priority for personalised transport reforms. The reforms aimed to strengthen safety standards across all segments of the industry, taking into account the risk of different forms of service provision and implementing proportionate regulatory responses.	Strengthen driver and customer safety	Has driver and customer safety been strengthened?
		Require vehicles to meet safety requirements	Are personalised transport vehicles safe?
		Ensure safety management systems are in place	Are safety management systems effectively managing the risk associated with providing personalised transport services?
2. Provide customers with greater choice and flexibility	The opening of the personalised transport market to ride-booking services aimed to improve customer choice and maintain a sustainable personalised transport industry.	Improve customer choice, through a more sustainable personalised transport industry	Is there sufficient diversity to ensure continued service and mitigate future personalised transport supply risk?
		Ensure continued provision of accessible services	Do customers have access to accessible services?
		Inform customer choices	Are there appropriate consumer protections?
3. Provide a regulatory framework that supports innovation and customer service	The personalised transport reforms aimed to address the regulatory balance between safety risks and industry customer service innovation.	Address regulatory balance between safety risks and industry customer service innovations	Is the level of regulatory oversight appropriate to facilitate improved safety outcomes while also allowing customer service innovation?
		Introduce regulation suited to new technologies and service delivery models	Has the regulatory framework been readily adopted?
		Streamline regulatory processes for current market conditions	Has the introduction of the new regulatory framework streamlined certain requirements for industry?

Table 1: Monitoring and evaluation framework

Strengthening of Safety Standards	Providing customers with greater choice and flexibility	A regulatory framework supporting innovation and customer service
<ul style="list-style-type: none"> • Introduction of a new Chain of Responsibility framework for the personalised transport industry, including duties in relation to safety and driver fatigue; • Signage requirements were introduced for ride-booking vehicles; • A standard Driver Authorisation category was created with access to a database on driver authorisation for the industry; • Zero drug and alcohol limits for drivers were introduced; • Annual inspections for all personalised transport vehicles (Certificate of Inspection); • Taxis retained exclusive access to rank and hail services; • Mandatory security cameras for personalised transport vehicles dependant on risk profile of the service; • Specifications for security cameras more flexible and outcomes focused; and • Compulsory Third-Party (CTP) insurance classes were reviewed, which included an additional class for booked hire vehicles and limousines. 	<ul style="list-style-type: none"> • Ride-booking services were legalised; • Annual licences to provide booked hire services were introduced; • Maximum fares for booked hire services were removed except for wheelchair accessible and Taxi Subsidy Scheme services; • Fare estimates were mandated for booked hire services and must be provided to the customer prior to the journey or a fare agreed up-front; • A new incentive payment for wheelchair accessible services was introduced; • Introduced new licensing regime, including the preservation of limousine service licenses and ceasing issue of perpetual taxi service licences. 	<ul style="list-style-type: none"> • Red tape was removed from the industry to drive innovation and improved customer service standards: <ul style="list-style-type: none"> - Maximum age limits for taxis were removed, while limousines that reached their age limit could continue to be used to provide limousine services; - Regulatory requirements related to customer service were removed to allow customer demand and competition to drive service standards; - Requirement for taxi service contracts for taxi booking companies removed; - Requirement for operator accreditation removed; - Taxi driver bailment requirements removed; • Electronic payment surcharges were capped at five per cent.

Table 2: Summary of reforms

COVID-19

Since March 2020, the COVID-19 global pandemic has presented great challenges to the personalised transport industry, principally through the reduction in passengers due to reduced movement in the community and border closures. At the very height of the pandemic some parts of the industry reported the loss of over 90 per cent of patronage year-on-year, and in 2021 estimated patronage to be about 20-30 per cent below pre-pandemic levels, particularly in South East Queensland.

The State Government announced support for taxi, limousine and rideshare drivers and operators as part of a \$54.5 million essential transport services package. The assistance package was designed to help the industry withstand and recover from the impacts of the pandemic and included:

- an extension of existing Booked Hire/Taxi Driver Authorisations and taxi/limousine licences for a period of six months
- a further waiver of the annual Taxi Industry Security Levy in 2019/20
- extending booking entity authorisations for six months and temporary extension to the refund policy for holders of booked hire service licences to receive pro-rata refunds if they chose to surrender their licence
- waiving fees for operators to deregister and reregister their vehicles.

A further \$23 million in financial support was subsequently made available to support the taxi and limousine industries through the economic impacts of COVID-19 and to ensure services can continue to operate. The assistance recognised the key role the taxi and limousine industry plays in keeping people moving across the state. Essential workers and vulnerable members of our community rely on personalised transport and wheelchair accessible taxis to access crucial medical appointments and other essential travel. The assistance package was designed to help the industry unite and recover from the immediate impacts of the coronavirus pandemic.

The financial assistance was delivered through one-off lump sum payments of:

- \$1,000 per licence to taxi and limousine licence holders
- \$3,500 per licence to taxi and limousine operators
- \$1,000 per licence as an additional incentive payment for wheelchair accessible taxi operators
- \$1,500 per vehicle to authorised booking entities for each affiliated taxi or limousine, capped at 1,000 vehicles, for entities that provide booking services predominantly for taxis and/or limousines.

The Queensland Government has also subsequently waived the Taxi Industry Security Levy in 2020/21, saving taxi licence holders in relevant taxi service areas approximately \$405 per taxi service licence. The Taxi Industry Security Levy has not been charged for five years, since 2016-17, following the commencement of the reforms. This was initially to support taxi licence holders in transitioning to the new framework. Subsequently, the waivers have been applied as part of continued support during COVID-19.

The emergence of the COVID-19 pandemic since early 2020 has disrupted industry's ability to stabilise under the new framework. Its repercussions have also impacted the department's ability to have a settled base to monitor, review and evaluate the new regulatory framework. Because of the ongoing uncertainty associated with the pandemic and the recovery for Queensland it is unclear what the lasting impact on the industry will be. The Department of Transport and Main Roads will continue to monitor impacts of and the extent of the industry's recovery from COVID-19, and review any issues emerging in relation to the personalised transport framework as part of its ongoing role as an industry regulator.

Enhanced Safety Standards

Ensuring customers have access to safe personalised transport services is of the highest priority to government.

Alongside the legalisation of booked hire services as part of the personalised transport industry in Queensland, the government delivered reforms focused on strengthening safety standards and on holding all personalised transport providers to consistent, high standards of safety. The safety standards introduced under the new personalised transport framework have included:

- reforms to the overall regulation of the provision of safe personalised transport services through the introduction of a chain of responsibility framework that includes a primary safety duty and a fatigue management duty
- the introduction of a new requirement for approved security cameras based on the risk profile of the service
- updated security camera specifications that require audio recording in addition to video recording and are more flexible and outcomes focused
- requirement for all personalised transport vehicles to be identified through different forms of signage or identifiers
- a single category of driver authorisation for all drivers who provided personalised transport services, called Booked Hire/Taxi Driver Authorisation
- the application of the zero blood-alcohol concentration limit consistently to all personalised transport drivers
- mandatory driver training for all personalised transport drivers in anti-discrimination awareness including sexual harassment and disability awareness before they provide a service. Drivers who provide wheelchair accessible services must also complete training in providing wheelchair accessible services
- new class of Compulsory Third Party (CTP) insurance for booked hire vehicles and limousines, and ride-booking vehicles no longer able to use a "private purpose of use" identification
- standardised vehicle requirements including annual vehicle safety inspections under an annual Certificate of Inspection
- registers of licences, authorised booking entities, and authorised drivers so that booking entities will be able to check that all parties hold necessary approvals to deliver personalised transport services.

Under stage 3 of the personalised transport reforms, the impact of these enhanced safety standards has been evaluated to verify that the framework is continuing to ensure the delivery of safe personalised transport services.

Outcomes

Crashes

Since the introduction of ride-booking services to Queensland, the total number of personalised transport service licences in the state has risen from 3,840 in 2014 to the current figure of 19,956 as at 30 June 2021. This corresponds with the introduction of over 16,000 booked hire service licences leading to a significant increase in the number of personalised transport vehicles on the road.

On a per-licence basis, the number of accidents has slowly decreased during the reform period (figure 1). This indicates that the safety of personalised transport trips has remained consistent or improved since the reforms. Furthermore, the different modes of transport (taxi, limousine, and booked hire vehicle) are broadly comparable in safety in terms of the rate of accidents per licence, with all showing improved performance over the evaluation period. The Motor Accident Insurance Commission (MAIC) is focused on reducing the incidents and effects of road trauma due to taxi related crashes. MAIC works closely with the Taxi Council of Queensland on accident mitigation strategies and provides the peak body with quarterly data and actuarial reports which has significantly improved the claims experience for class 3 taxis.

The total number of traffic accidents related to personalised transport vehicles has risen during the same period, correlating with the increased number of personalised transport vehicles operating. However, the analysis is based on

the purpose of use of the vehicle and does not distinguish whether accidents in booked hire vehicles occurred when the vehicle was being used for private or passenger transport purposes.

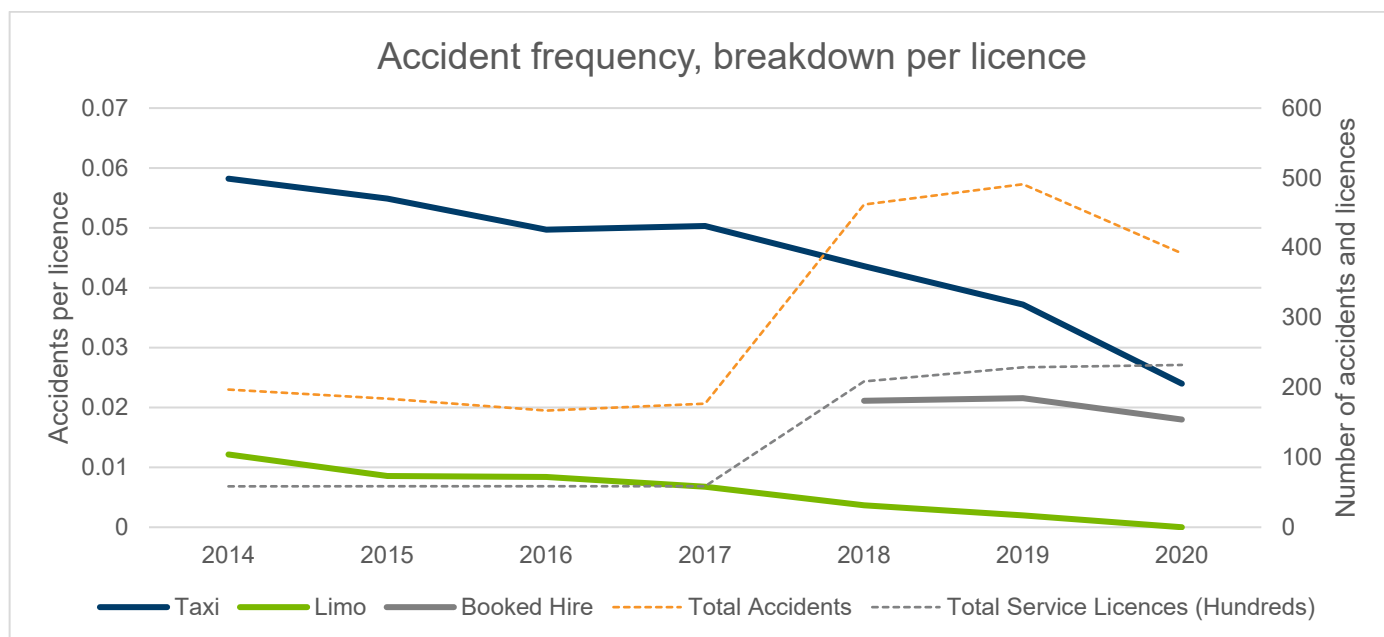


Figure 1: Accident analysis

There has been no noticeable shift in the seriousness of crashes as a result of the personalised transport reforms (figure 2). Fatal accidents remain stable and extremely low, with an average of one occurrence per year. The proportions of accidents which result in minor injury, injury requiring medical treatment, and injury requiring hospitalisation have not changed to a significant extent. There has been a slight fall in the percent of accidents which result in a hospitalisation, however the yearly figure is variable.

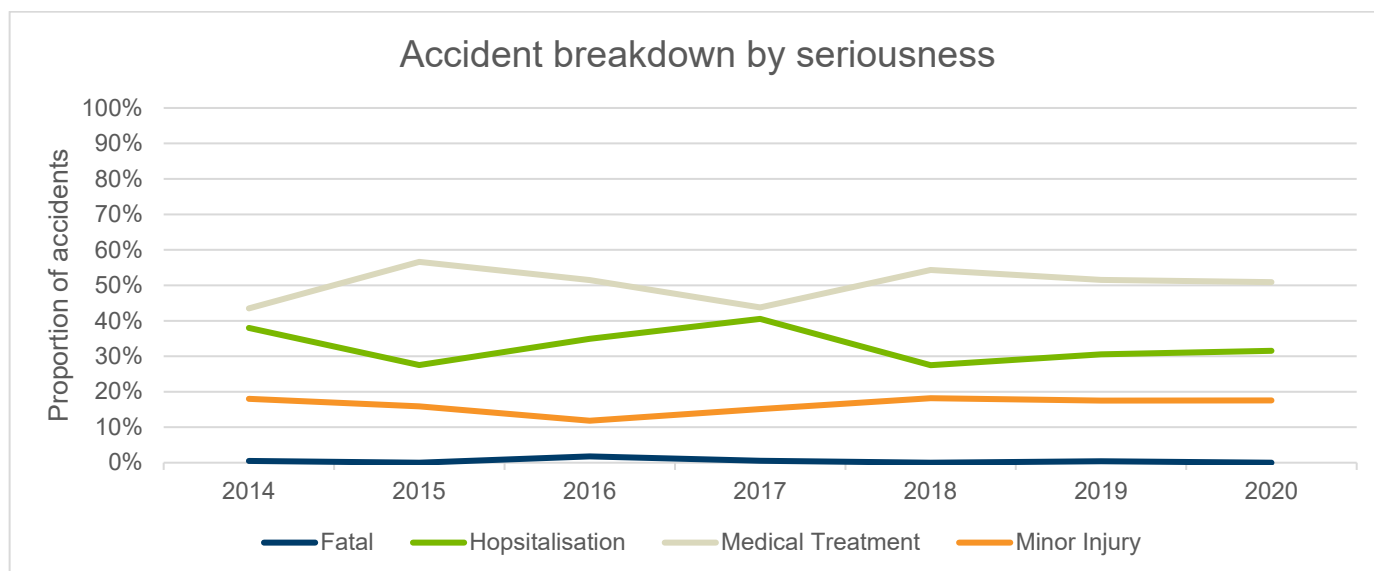


Figure 2: Accident breakdown

Accidents which have been categorised as having driver fatigue as a contributing factor are negligible (figure 3), with the maximum being four fatigue-related incidents in any year, none of which were fatal.

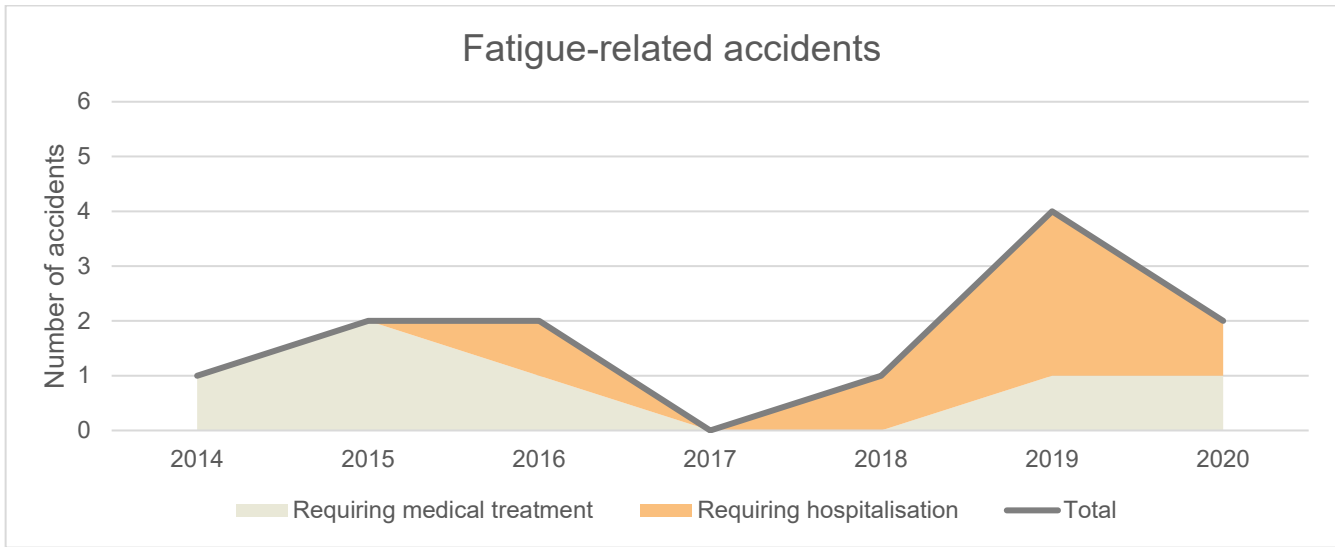


Figure 3: Fatigue-related accidents

Compliance

The Department of Transport and Main Roads undertakes ongoing education, compliance, and enforcement of the personalised transport industry regulatory framework to ensure high levels of industry compliance and to maintain high standards of safety within the industry. This activity was supported by an increase in the number of compliance officers by 14 Transport Inspectors and two investigators from March 2018, to provide increased on-road compliance and investigative capacity.

Since the introduction of the personalised transport reforms, Transport Inspectors have intercepted approximately 250 limousines, 29,000 taxis and 30,000 booked hire vehicles. However, on-road capacity to undertake compliance checks has been substantially reduced in 2019-20 and 2020-21 as a result of the deployment of compliance resources to support Queensland's COVID-19 response.

Trend data from on-road intercepts of personalised transport vehicles is regularly reviewed and has been analysed to identify changes over time since the introduction of the personalised transport reforms.

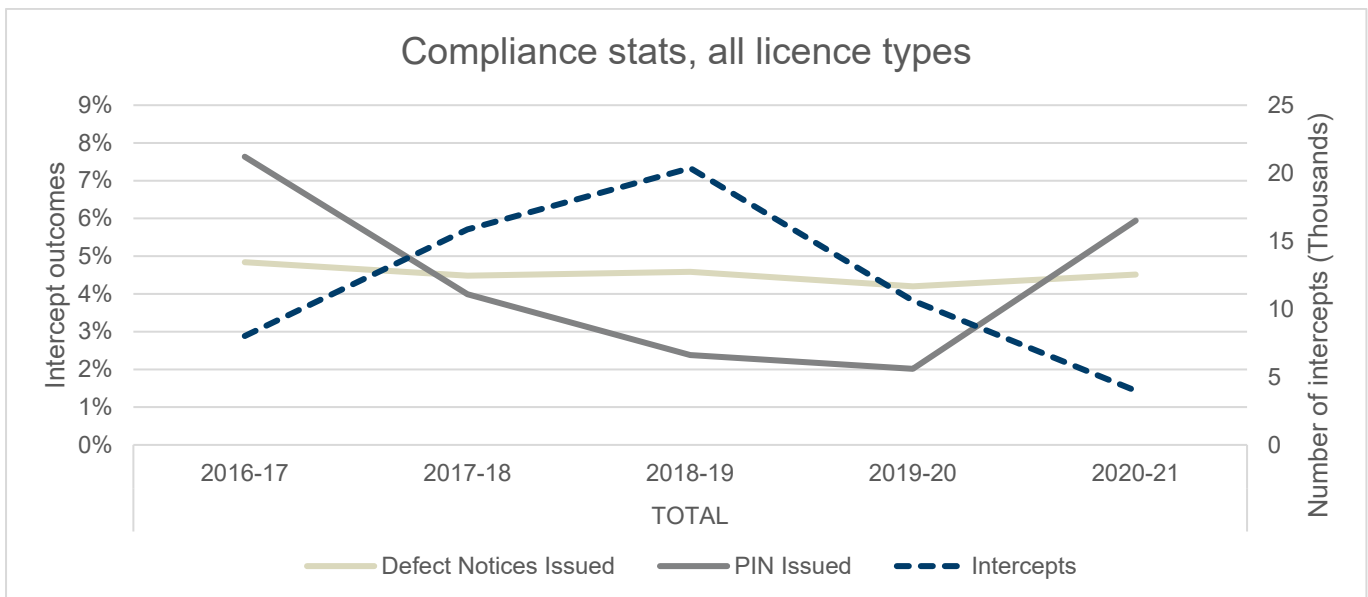


Figure 4: On-road intercept outcomes

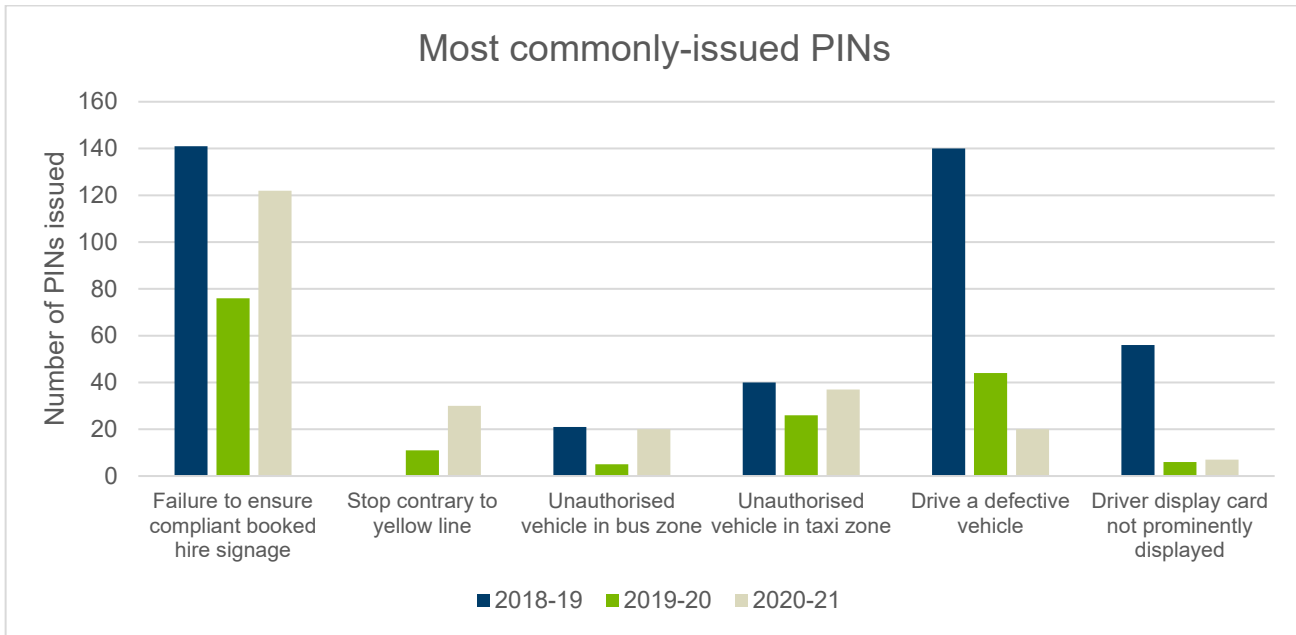


Figure 5: Most commonly issued PINs

In general, this data shows improved compliance with the personalised transport framework over time and, in particular, a reduction in the rate of defect notices per intercept over the period from 2016-17 (figure 4). These findings indicate that the changes to vehicle requirements that were introduced as part of the personalised transport reforms, including reducing the frequency of vehicle inspections from six-monthly to annually and removing the maximum age limit for taxis, have not led to adverse safety outcomes. This is also reflected in findings from the Department of Transport and Main Roads' 2021 customer satisfaction survey that 90 per cent of ride-booking customers and 84 per cent of taxi customers were satisfied with the mechanical reliability of the vehicle, and only 3 per cent of customers expressing dissatisfaction.

From 2016-17 to 2019-20, the rate of issue of Penalty Infringement Notices (PINs) issued per intercept also showed improved compliance with the framework over time (figure 4). However, in 2020-21, the rate of PINs increased. Figure 5 shows the most commonly-issued PINs from 2018-19 to 2020-21. This shows that the increase in PINs in 2020-21 was primarily due to failures to display a compliant booked hire sign and this is the main area where compliance with regulatory requirements has not improved over the evaluation period. Although this is partly attributable to an initial focus on education around the booked hire signage requirements as the personalised transport reforms were introduced before moving towards a strong enforcement posture, it demonstrates that there are continued issues with compliance with this requirement. Another notable offence for which PINs have been issued is unauthorised vehicles stopping in a bus or a taxi zone.

Chain of Responsibility

The personalised transport reforms established a new chain of responsibility framework that applies across the entire personalised transport industry. The chain of responsibility framework sets out the legal obligations of each participant involved in the provision of personalised transport services, with a strong focus on improved safety outcomes. It established two main safety duties:

- **Primary safety duty** to ensure, as far as reasonably practicable, the safety of activities relating to providing the service. This requires each person in the chain of responsibility to eliminate or minimise safety risks.
- **Fatigue duty** to take all reasonable steps to ensure a person does not drive whilst their ability is impaired by fatigue.

The persons in the chain of responsibility framework include the:

- operator of the service
- holder of a licence used to provide a personalised transport service

- driver of a vehicle used to provide the service
- registered operator of the vehicle used to provide the service
- holder of a booking entity authorisation to provide booking services for the service
- local nominee for a foreign authorised booking entity.

All persons in the chain of responsibility have a shared responsibility to ensure the safe provision of taxi or booked hire services, based on the functions they perform.

The Department of Transport and Main Roads has developed a chain of responsibility audit framework to assess compliance with Queensland's personalised transport legislation. The Departments' approach includes both a scheduled audit program and triggered audits based on an incident, complaint or an issue identified from an interception. To gain the greatest visibility over the industry's compliance with the personalised transport framework, scheduled audits with authorised booking entities ensure appropriate systems and processes are in place to meet their legislative responsibilities. To help industry ensure they are compliant and to prepare for an audit, the Department of Transport and Main Roads has published information about the process on its website including examples of evidence that can be provided in an audit and an overview of the audit assessment approach.

The Department of Transport and Main Roads has supported the industry in ensuring the delivery of safe services for the public through significant investment in improved IT systems and online services throughout stage three of the reforms:

- The personalised transport register is available online and provides details of booking entity authorisations and taxi, limousine and booked hire service licences. This enables the industry to easily ensure that licences and booking entity authorisations are current and to take steps to meet their chain of responsibility requirements by ensuring that work is only allocated to appropriately licensed vehicles.
- Application programming interfaces have also been made available for booking entities to easily search both the personalised transport register and the driver authorisation register to ensure that their affiliated vehicles and drivers are continuing to meet regulatory requirements.
- Automatic suspension of booked hire service licences if the vehicle ceases to meet statutory requirements during its 12-month term. This is based on ongoing monitoring of currency of: the Queensland vehicle registration, certificate of inspection, correct compulsory third party insurance class and correct purpose of use. When a suspension takes effect, the relevant booked hire service licence will no longer appear as current on the personalised transport register until the issue is remedied.

Security cameras and personal safety in personalised transport services

Customer and industry perceptions of safety

The Department of Transport and Main Roads' annual customer and industry surveys in 2019 and 2020 have found that customers feel safe using personalised transport services, with 70 per cent of taxi customers and 75 per cent of ride-booking customers feeling safe or very safe and 5-6 per cent feeling unsafe. The lowest levels of personal safety are among passengers travelling on their own at night in taxis.

The majority of drivers feel safe, with 94 per cent of limousine drivers, 79 per cent of ride-booking drivers and 71 per cent of taxi drivers feeling safe or very safe in the 2020 survey. Taxi and ride-booking drivers' biggest concern is to maintain their personal safety. Their feelings of safety vary throughout the day, with significant lower levels for night-time than daytime shifts. Intoxicated and out of control passengers are the most common reason for feeling unsafe. Taxi drivers reported that they feel more impacted by passengers' anti-social behaviour because detection and traceability of anonymous passengers is less likely, and they feel that people who hail taxis or use the ranks are more likely to be alcohol or drug affected avoiding adverse ride-booking ratings.

Security camera framework

The personalised transport reforms introduced a risk-based approach to the use of security cameras that was consistent in all personalised transport vehicles to support personal safety. Approved security cameras are now mandatory in all taxis, limousines and ride-booking vehicles in relevant areas where one or more of the following applies:

- the driver or passenger is anonymous – in such circumstances, there is less opportunity for the perpetrator of a criminal act to be identified
- cash payments/transactions are accepted – increasing the likelihood of incidents of theft and robbery
- the point of payment is made in person before, during, or after the journey – because this increases the opportunity for fare evasion.

As part of the evaluation of the personalised transport reforms, the Queensland Government engaged consultants to undertake a review of driver and passenger safety in the personalised transport industry and assess whether the risk-based approach to security camera requirements has been successful.

The review undertook research into safety measures available in different jurisdictions, engaged with drivers, passengers and wider industry stakeholders, and analysed data held by the Department of Transport and Main Roads in relation to camera downloads and driver disaffiliation and by the Queensland Police Service on safety-related incidents. The engagement carried out as part of the review found that:

- passengers generally do not consider safety or security cameras when choosing a mode of personalised transport
- taxi drivers believe that cameras are essential to security and that all personalised transport vehicles should have them
- ride-booking drivers would welcome the option to introduce affordable non-hardwired recording technology, such as a dash-cameras into their vehicles. This is not necessarily related to improving safety outcomes, but rather protecting their job security from unfair or vexatious customer complaints
- limousine industry stakeholders considered that there were no security concerns in the limousine industry and did not believe the security camera risk framework should apply to their industry because it was unnecessary, costly, impractical for their vehicles and damaging to their business model. This was also identified as a priority area for the industry through the Personalised Transport Industry Reference Group
- all representatives other than taxi industry felt that a requirement for wider installation of approved security cameras would have significant adverse economic implications for the industry that are not justified by current safety trends.

The analysis of quantitative evidence found that assaults on drivers are more common than those against passengers. The greatest number of police incidents were recorded in taxis, predominantly due to fare evasion incidents which accounted for 85 per cent of all incidents analysed. The number of police incidents was much lower within ride-booking services but there was a higher frequency of sexual offences in ride-booking services than other modes on a per trip basis. This finding has been carefully analysed. At this stage, the total number of sexual offence incidents reported to the police remains low in both modes, with sexual offence incidents in taxis ranging from a high of 14 incidents in each of 2014-15 and 2015-16 to 8 incidents in 2018-19 and sexual offence incidents in ride-booking services showing a high of 12 incidents in 2017-18. This means that relatively minor variations can appear significant when presented on a normalised basis. The number of police incidents reported for limousines was negligible, totalling 23 incidents across five years, of which 60 per cent related to the theft of a vehicle.

The review found that the regulation of safety measures in Queensland is similar to national and international trends, and that the current risk-based approach to security camera requirements and the risk criteria were well-targeted at the most common incident types. It concluded there is currently no clear case for mandating security cameras more widely in ride-booking services at this point in time.

The Department of Transport and Main Roads will continue to monitor the evidence and research to ensure that any change in the evidence base or increase in security-related concerns associated with ride-booking services in future is identified and appropriate policy responses considered.

The review also found that the evidence suggested there are limited safety concerns for limousines and does not provide strong evidence for the inclusion of limousines under the risk profile.

The review found that limiting the requirement for security cameras to relevant areas was supported by offence data that indicated that areas that require security cameras report higher rates of crime involving personalised transport services than areas where they are not required.

Taxi industry concerns about the inequity of the risk-based approach to security cameras meaning that taxi operators are mandated to bear the cost of installing security cameras in their taxis when booked hire services frequently do not

have to bear the same costs have been considered. However, this is considered to be a consequence of the higher risk profile associated with taxi services compared with ride-booking services and is justified on analysis of incident data at this point in time.

Concerns from booked hire operators about the expense of purchasing and installing an approved camera system, the impacts of installing it in their vehicle and the lack of privacy in vehicles which are also used in a personal capacity have been considered. However, it is considered crucial that the privacy of customers of personalised transport services is appropriately protected. Focus groups have been used to explore customer attitudes towards privacy and found a strong sentiment against any relaxation of approval standards that might permit a wider range of security cameras to be installed. Customers considered this risked invading their privacy and the safeguards associated with approved camera systems were valued. In addition, the legislation also protects drivers when they are using a vehicle in a personal capacity as a security recording may not be downloaded when the vehicle was not being used to provide a booked hire or taxi service.

On this basis, the Government has decided that the current approach to security camera requirements is broadly appropriate and should be maintained, and that the Department of Transport and Main Roads will continue to monitor safety data and issues. However, the Queensland Government notes the finding that there is little justification for the requirement for the risk-based approach to security camera requirements in limousines and plans to review the relevance of the security camera risk framework for limousines to consider the wider risk profile associated with limousines.

Driver disaffiliation notifications

In all instances where a driver is disaffiliated from a personalised transport service due to serious safety misconduct by the driver, the authorised booking entity must notify the Department of Transport and Main Roads. This information can be used to suspend or cancel a person's driver authorisation if it is deemed to be in the public interest. The requirement to report driver disaffiliation for serious misconduct has resulted in 571 reports from October 2017 to June 2021 (figure 6), predominantly for ride-booking services. This has contributed to enhanced safety standards and customer protection through identifying incidents and, where relevant, enabling the Department of Transport and Main Roads to consider action in relation to Driver Authorisation or to refer incidents to the Queensland Police Service for investigation.

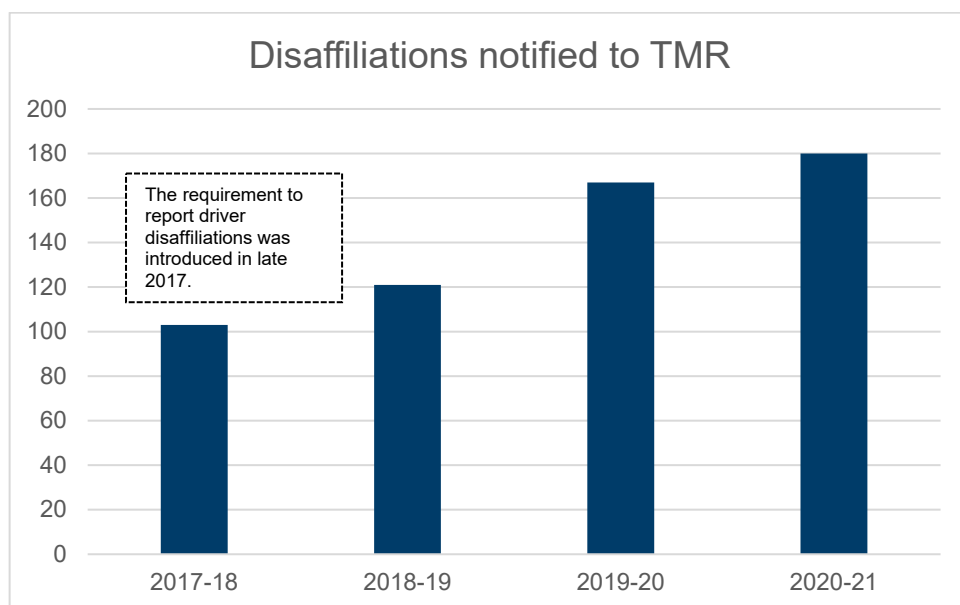


Figure 6: Driver disaffiliation notifications

Vehicle Identification

It is important for passengers to be able to safely identify their personalised transport vehicle, to ensure they only enter appropriately licensed vehicles and are not at risk of travelling in the wrong vehicle. Under the personalised transport

framework, all personalised transport vehicles are required to be identifiable for customers and for enforcement officers.

All taxis and limousines are identifiable by their distinctive number plates. Taxi plates start with the letter 'T' and they are additionally required to have a hail light. Limousine plates start with the letter 'L' or 'SL'. All other vehicles used to provide booked hire services must display a ride-booking service identification sign, approved by the Department of Transport and Main Roads, that clearly identifies the booking entity for which the service is being provided.

The Department of Transport and Main Roads has also delivered a personalised transport register, which allows any member of the public to view details of current booked hire service licences, limousine licences and taxi service licences online. This means that a passenger can search the register for the number plate of their vehicle to ensure that it is properly licensed to deliver taxi or booked hire services.

The vehicle identification requirements that have been established as part of the personalised transport reforms have supported safety for customers in using taxi and booked hire services by enabling them to clearly identify their vehicle.

Booked hire signage requirements

Approximately two-thirds of customers are aware of signage requirements for ride-booking services. Many respondents rely on the signage to identify the correct vehicle, and feel the signage obligations are a valuable safety feature that make verifying their vehicle easier although is sometimes difficult to see on vehicles with tinted windows. Customers also indicated that they check the number plate of their booked hire vehicle and check their taxi number plate to ensure it is a T-plate before entering the vehicle.

The Department of Transport and Main Roads has received complaints from representatives of the taxi and limousine industry about the requirement for booked hire vehicles to display removeable signage rather than distinguishing number plates. There are concerns that this has the potential to allow drivers to remove their signs to undertake illegal trips that are not booked through an authorised booking entity, and does not provide the same certainty that a vehicle is appropriately licensed. There is very little evidence available to substantiate concerns that illegal booked hire operations are a widespread issue, although the Department of Transport and Main Roads continues to monitor all enforcement issues and to investigate complaints received. An approach of requiring booked hire services to display identification signs was first introduced in Australia by Queensland and is now common across other jurisdictions in Australia, and balances the fact that booked hire vehicles are more likely to be used for a mixture of private and passenger transport purposes than taxis or limousines. The high rates of customer confidence in the vehicle identification requirements for booked hire vehicles supports this position.

Engagement as part of the review of driver and passenger safety in the personalised transport industry identified some concern from ride-booking drivers that the increasing number of affiliations with different booking entities was creating practical issues where a separate sign is required to be displayed for each affiliation and had potential to obstruct their clear view of the road. This finding was reinforced in annual industry surveys and focus groups. Drivers recommended a generic booked hire vehicle sign approved by the Department of Transport and Main Roads to allow vehicles to be identifiable as providing a booked hire service without the need for multiple signs to be displayed identifying specific booked hire companies.

Currently, the Department of Transport and Main Roads advises that drivers who find multiple signage is obstructing their view of the traffic or road must reduce the number of signs and only display relevant signage for the booking they are taking, or alternatively revisit the number of booking platforms they are logged into. Compliance issues are still being encountered with the display of compliant booked hire signage by booked hire drivers (figure 5 above), which are in many cases linked to attempts by drivers to reduce the window space taken up by signs.

The concerns raised by some industry stakeholders about the requirement to display multiple ride-booking signs if taking bookings for multiple booking entities will be considered further by the Department of Transport and Main Roads in consultation with industry representatives to consider safety impacts. However, a generic booked hire sign has not been supported by the Department of Transport and Main Roads to date because it does not identify the booking entity for a customer, which has been considered to be an important safeguard for customers. Furthermore, there may be unforeseen impacts on driver fatigue and driver distraction if changing booked hire signage regulation encourages drivers to take bookings through more booking entities simultaneously, even though this is not the primary purpose of the policy.

Limousine plates

Limousine industry representatives have indicated concern that certain personalised number plates can lead to people mistaking a booked hire vehicle for a licensed limousine. This could potentially lead to a hirer wrongly identifying their vehicle, being charged a higher booking fee in the belief the vehicle is a limousine, or wrongly believing that they can legally consume alcohol in the vehicle. The Department of Transport and Main Roads has banned the sale of certain personalised number plates that have the potential to mislead the public into believing that a vehicle is a licensed limousine or taxi.

Pick-up and drop-off zones

Under the personalised transport reforms, only taxis may use taxi ranks to pick up and drop off passengers because they are the only vehicles that may undertake rank and hail work. Booked hire vehicles and limousines are permitted to stop in passenger pick-up and loading zones to pick up or drop off passengers safely but are only permitted to provide a pre-booked service.

Challenges with picking and dropping off passengers safely in busy areas, particularly the CBD, was raised with the Department of Transport and Main Roads as a priority issue by the limousine and ride-booking industry through the Personalised Transport Industry Reference Group, and was also identified as an issue as part of the industry engagement undertaken during the review of driver and passenger safety in the personalised transport industry.

It is important to provide appropriate safeguards to ensure that passengers are not encouraged to approach booked hire vehicles and limousines without a prior booking. This is an important element in the safety structures of the personalised transport framework. In particular, it is considered that allowing booked hire vehicles and limousines to wait for a booking at dedicated zones would encourage informal ranking and undermine the safety protections for passengers.

The Department of Transport and Main Roads supports the appropriate provision of pick-up and drop-off kerb space, such as loading zones that allow vehicles to briefly stop for passengers to alight. Decisions regarding the allocation of space for such zones are typically the responsibility of local governments. It is recognised that there is significant pressure for kerbside space which local governments need to manage appropriately and safety. The Department of Transport and Main Roads will continue to engage with councils on specific issues associated with kerbside management.

Secure Rank Program

The Queensland Government established the Secure Rank Program in 2005 as part of its initiatives to enhance safety and minimise incidents of alcohol-fuelled violence in late night entertainment precincts among people queuing for a taxi by moving people quickly away from these precincts. Secure taxi ranks operate on Friday and Saturday nights, and some public holidays and special events. They are staffed by rank marshals and security guards so that passengers can queue in an environment that is free from anti-social and criminal behaviour and where there is a coordinated supply of taxis to the rank to meet demand.

As a result of the reforms of the personalised transport industry, there has been an increase in late-night transport options for passengers, with booked hire services offering alternatives to taxis for travel from late night entertainment precincts. The Department of Transport and Main Roads is currently reviewing the Secure Rank Program to evaluate its effectiveness in contributing to the safety of passengers and drivers in late night entertainment precincts, whether there are alternative approaches that would deliver benefits, and the extent to which it delivers value for money.

Fatigue Management

As identified above, fatigue management duties form a crucial part of the chain of responsibility framework. It is an offence for a driver to provide a taxi or booked hire service whilst impaired by fatigue, and all persons in the chain of responsibility framework have a duty to take all reasonable steps to ensure a person does not drive whilst fatigued.

As part of the personalised transport reforms, the Queensland Government committed to considering imposing other requirements relating to driver fatigue – which could include standards about time spent driving a motor vehicle, requirements relating to monitoring these matters or use of particular equipment or technology to manage driver fatigue.

There is some positive evidence in relation to fatigue in the personalised transport industry. The incident data reported earlier does not identify any significant increase in crashes involving personalised transport vehicles that are attributed to driver fatigue. Furthermore, over 90 per cent of drivers indicated an awareness and understanding of fatigue standards. However, driver fatigue is a complex issue and there are some anecdotal concerns within the industry about the prevalence of driver fatigue. In particular:

- taxi and ride-booking drivers have indicated in the Department of Transport and Main Roads' annual industry surveys and focus groups that they consider fatigue is a key issue for the industry and that there are loopholes to allow drivers to drive more than the maximum number of driving hours determined by their booking entity
- concerns that the increase in authorised booking entities and propensity for drivers to work for multiple booking entities (figure 10) may be enabling drivers to circumvent booking entities' fatigue management controls and to work whilst fatigued
- the risk that drivers work extra hours to maintain a level of income, given that the introduction of increased competition within the personalised transport industry has reduced driver hourly earnings – this has been identified through TMR's annual industry surveys and through industry engagement as part of the review of driver and passenger safety in the personalised transport industry.

Given the importance of ensuring effective management of fatigue across the industry, the Department of Transport and Main Roads has commenced further work to investigate the issue of fatigue management in the personalised transport industry to establish the incidence of high-risk fatigue behaviours and to consider whether further regulation of fatigue management might improve safety for drivers, passenger and the community. It is important that there is a firm evidence base on which to make decisions on whether further government regulation is necessary in this area. To ensure that policy decisions have a strong evidence base and to justify any increased costs to Government or industry, the Department of Transport and Main Roads' review comprises independent research into the key causes of fatigue in the personalised transport industry and what technologies and strategies have been effective at managing driver fatigue; and collection and analysis of fatigue and journey data from authorised booking entities to identify the prevalence of high-risk behaviours and any correlation between driving patterns and traffic incidents.

In addition, the chain of responsibility safety audits that are now commencing will help the Department of Transport and Main Roads to investigate in more detail any fatigue-related issues and to ensure that authorised booking entities have effective controls in place to enforce appropriate fatigue management policies.

Driver Training

The Department of Transport and Main Roads published the Personalised Transport Required Driver Training Notice in January 2019. This establishes mandatory training requirements for all taxi, limousine and booked hire drivers in Queensland. They must be trained in anti-discrimination awareness, including sexual harassment and disability awareness, before they provide a service. Drivers who provide wheelchair accessible services must also complete training in providing wheelchair accessible services. Offences apply if drivers provide a service without being trained or authorised booking entities and service operators use untrained drivers.

The Notice also specifies recordkeeping requirements for authorised booking entities, and the Department of Transport and Main Roads checks training records held as part of its chain of responsibility audit program.

CTP Insurance

During the personalised transport reforms, the Government committed to introduce a new class of CTP insurance for limousines and booked hire vehicles and to review and refine CTP premium prices over time as frequency and claims size for the classes became apparent. Equality of CTP premiums across the different modes was identified as a priority by the taxi industry through the Personalised Transport Industry Reference Group, because of the significantly greater cost associated with CTP for taxis than for other classes of personalised transport vehicles.

In response to changes to the personalised industry, the Motor Accident Insurance Commission (MAIC) is aligning CTP insurance premiums for personalised transport operators to reflect the similar services they provide. This applies to taxis (cars or station wagons), limousines, hire cars and booked hire vehicles. The base insurer premium that forms part of the total CTP insurance premium changed on 1 October 2021, and from 1 July 2022, the levies and fee that make up

the rest of the total premium will change to reflect the new arrangements. This will mean that the total cost of CTP insurance for these classes of personalised transport vehicles will be the same from 1 July 2022 onwards.

CTP premiums are reviewed each quarter by MAIC and may increase or decrease based on changes in the cost and number of claims. MAIC will be closely monitoring these changes on a quarterly basis and will be ready to respond should any unexpected trends or adverse impacts arise.

Key findings and next steps

The personalised transport reforms have delivered a comprehensive approach to driver, customer and vehicle safety:

- There has been a reduction in accidents involving personalised transport services per service licence in Queensland since the personalised transport reforms, and no noticeable increase in traffic incidents attributed to fatigue.
- Customer and driver perceptions of their personal safety in personalised transport services are high.
- The current risk profile for security cameras in vehicles to support personal safety is broadly supported by the available evidence and there is insufficient evidence to justify mandating security cameras in ride-booking vehicles at this point in time.
- Personalised transport vehicles are safe, with improvements in the rate of defects being identified during on-road compliance checks and high certificate of inspection pass rates being maintained. There is no increase in the proportion of accidents resulting in hospitalisation.
- IT systems delivered by the Department of Transport and Main Roads are supporting the delivery of safe personalised transport services in properly licensed and insured vehicles by appropriately authorised drivers.
- Processes to ensure mandatory notification to the Department of Transport and Main Roads when a booking entity ends a work arrangement with a driver because of serious safety misconduct has improved safety for passengers by allowing consideration of whether action against the person's driver authorisation is justified.

The Queensland Government is determined to maintain a strong focus on safety in the personalised transport industry, which continues to be a key priority area moving forward. The Department of Transport and Main Roads will deliver a program of work to continually improve oversight of safety in the industry and review the emerging issues identified in the evaluation of the framework:

- Undertake chain of responsibility audits to ensure compliance with key safety duties and gain further insight into any areas of non-compliance.
- Complete a detailed review of the evidence relating to driver fatigue in the personalised transport industry to investigate the effectiveness of the current regulatory and operational approaches and identify whether it is necessary to impose additional regulatory requirements.
- Complete a review of the Secure Rank Program to assess whether it is effectively delivering improved safety outcomes that support the delivery costs.
- Review the relevance of the security camera risk framework for limousines on the basis of the insignificant number of safety incidents reported in limousines.
- Investigate concerns about vehicle identification requirements by considering banning potentially misleading number plates; and engaging with industry stakeholders to consider issues with displaying multiple booked hire identification signs.

Choice and Flexibility

A key objective of the reforms was to provide customers with access to greater choice and flexibility in personalised transport services whilst ensuring that there is a sustainable and competitive industry to deliver them. Changes to the personalised transport framework to provide customers with greater choice and flexibility through a sustainable personalised transport industry have included:

- a new legislative structure for booked hire services that legalised ride-booking
- introducing annual licences to provide booked hire services, whilst preserving existing limousine licences and taxi service licences
- mandating fare estimates for booked hire services that must be provided to the customer prior to the journey, or the fare agreed up-front
- a new incentive payment for wheelchair accessible services to support equitable access to appropriate services for people with a disability
- removal of maximum fares for the majority of services, whilst retaining price protections for all rank and hail services, and for booked services for Taxi Subsidy Scheme and wheelchair services
- review of Compulsory Third Party (CTP) insurance for the personalised transport industry.

Customer choice through a sustainable industry

Choice

Queensland's customer survey in December 2020 showed that around one-quarter (28 per cent) of Queenslanders identify as using personalised transport services monthly or more, and a further half have used personalised transport services previously. Of regular users, over 40 per cent use ride-booking services only and 20 per cent use taxi services only.

Customers perceive more choice and improved services since the reforms and consider that they are able to access services that meet their needs. In 2019, 63 per cent of customers thought they had more choice of service provider than 12 months previously and 58 per cent thought there was more service flexibility. In the 12 months to 2020, the findings had stabilised, but around half of customers thought that choice and flexibility had continued to improve in and only 6 per cent thought that there was less choice and flexibility. Customers in South East Queensland are more likely to believe there is greater choice than in the rest of Queensland.

The majority of taxi, booked hire and limousines drivers agreed personalised transport in Queensland meets customer needs, and offers enough customer choice.

Patronage

Patronage data shows stable and increasing overall trip volumes in the industry as a whole before the significant impacts of the COVID-19 pandemic. Annual trip numbers paint a picture of a growing overall market for personalised transport services, but a relative decline in market share for taxi trips.

Despite shrinkage in traditional market segments, notably taxi services, the data suggests a significant overall increase in total trips since the introduction of ride-booking services, suggesting latent demand which has been met by new service models (figure 7):

- Booked services have increased 28 per cent from approximately 30 million in 2015 to over 38 million for the 2018-19 and 2019-20 financial years.¹

¹ Based on comparison between reported data under the new mandatory data reporting requirements for authorised booking entities from 2017 onwards and booked taxi service data reported to the Department of Transport and Main Roads prior to the reforms (noting that taxi services comprised almost the entire booked market at the time, with only a negligible share of limousine trips).

- The total personalised transport trips, including booked services and rank-and-hail services, are estimated to have increased by 18 per cent from approximately 39 million in 2015 to over 46 million in 2018-19.²

Patronage for 2019-2020 shows a slight decrease from the previous year despite the significant impact of the COVID-19 pandemic affecting a full quarter of trip data, with Queensland's longest lockdown beginning in March. It is projected that the total personalised transport trips would have increased further in 2019-20, but for these impacts. There was an increase in 2020-21.

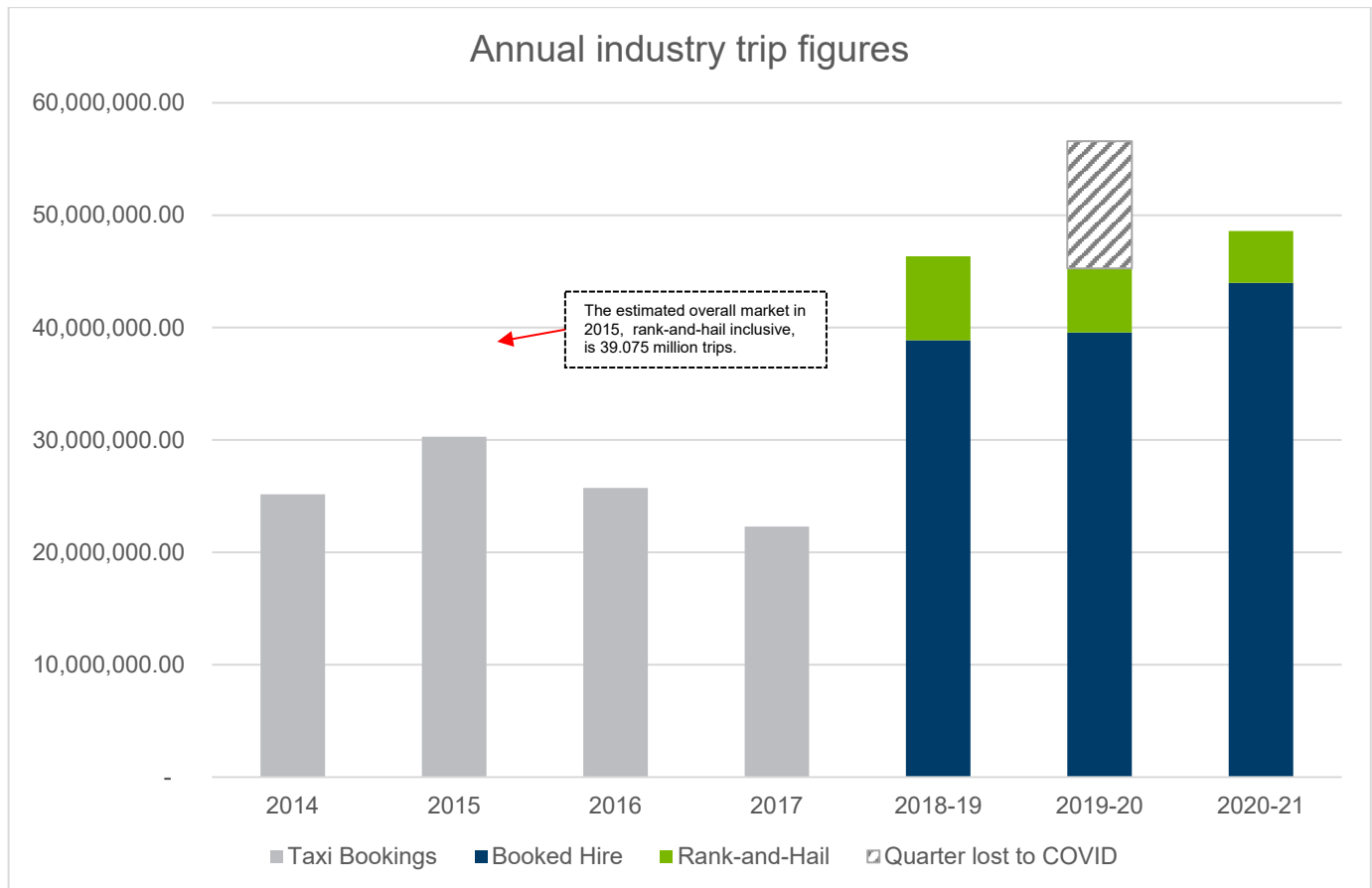


Figure 7: Annual industry trip figures

Regional variation

Although more than 75 per cent of customers are satisfied with their personalised transport experience, and 77 per cent say they can access services when needed, there are some demographic differences in the perception of personalised transport accessibility. Customers in South-East Queensland are more satisfied with access to services than those in the rest of the state (figure 8). In particular, they find that services are more available when and where they need them compared to the rest of Queensland. This finding is reinforced by findings about the use of personalised transport services: the proportion of respondents who used personalised transport monthly or more in South East Queensland (19 per cent) was more than twice as high as in the rest of Queensland (9 per cent).

² The trip estimate for 2015 is based on industry data for South East Queensland presented in the *White Paper – The future of Queensland's personalised transport industry* report, grossed up by the historically robust assumption of an approximate split of trips of two-thirds in South East Queensland and one-third in the rest of Queensland.

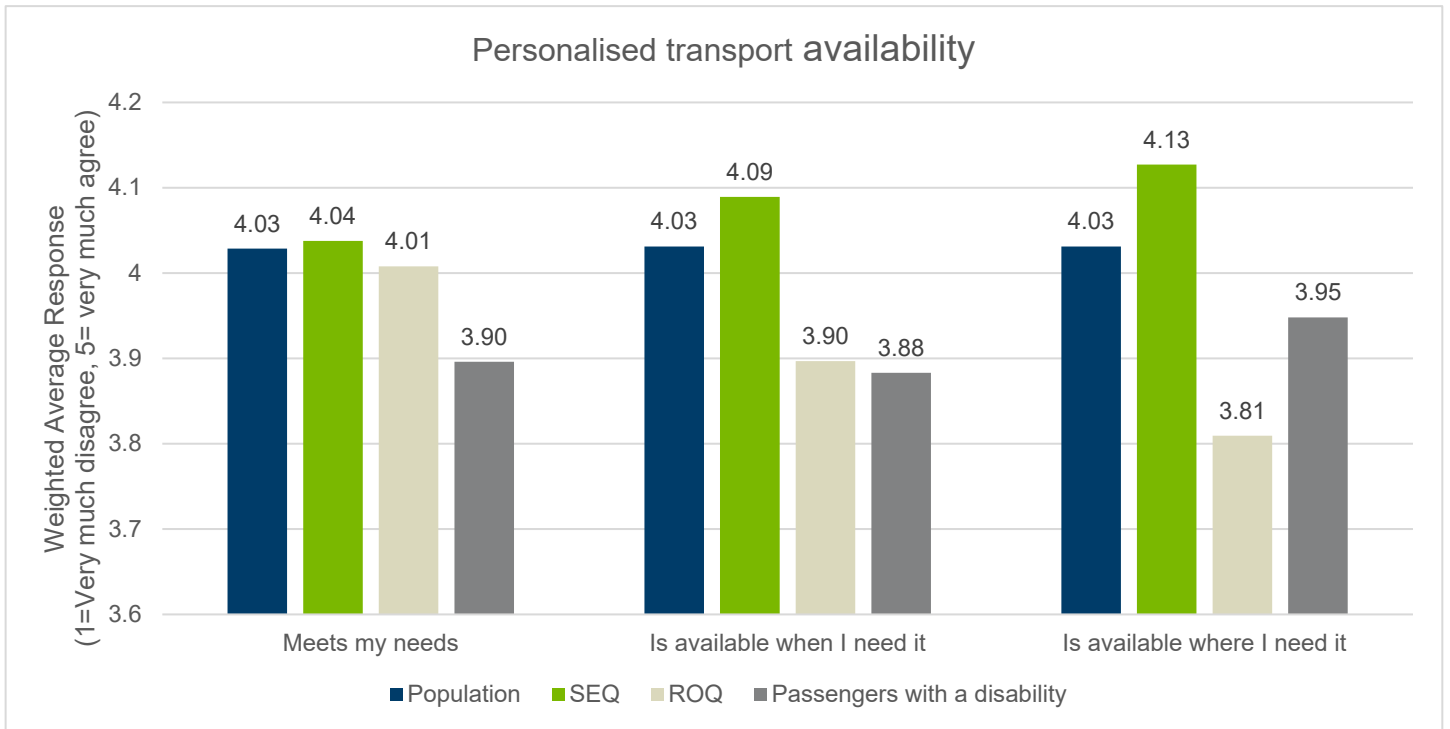


Figure 8: Personalised transport availability (December 2020)

Industry participants in the personalised transport market

Increased industry participation in the personalised transport market is an important measure of the effectiveness of the reforms in delivering increased choice to customers and in ensuring that there is sufficient diversity to ensure continued service provision and mitigate future personalised transport supply risks. A range of measures demonstrate that a significant number of new participants have entered the market. In particular, there has been a significant uptake of the new booked hire service licences introduced as part of the personalised transport reforms, along with increasing numbers of authorised booking entities:

- Between 1 October 2017 and 30 June 2021, the Department of Transport and Main Roads issued 76,000 booked hire service licences to 35,000 customers. There were over 16,000 booked hire service licences at 30 June 2021;
- The number of authorised booking entities has continued to increase and there were 446 authorised booking entities at 30 June 2021. The number of authorised booking entities reporting that they operate in each region has increased over two years from 2018-19 to 2019-20 (figure 9). There was a slight decrease in the number of authorised booking entities in the last quarter of 2019-20, attributable to the impact of COVID-19 on the industry.

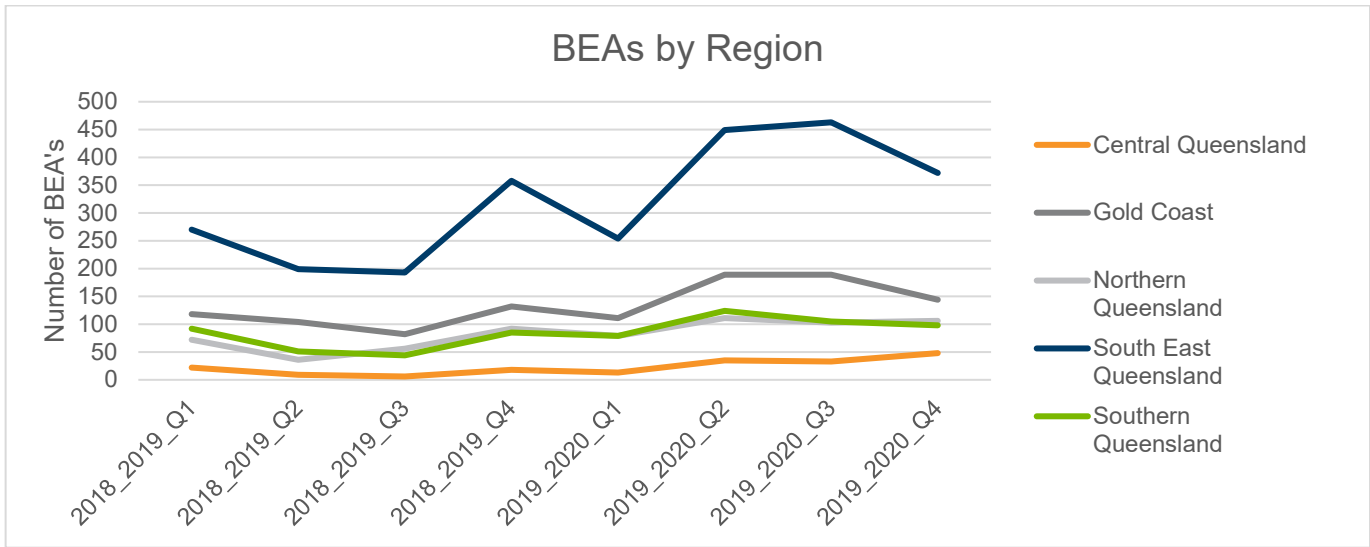


Figure 9: Number of authorised booking entities (BEAs) operating in each region³

Drivers and vehicles are increasingly affiliated with more than one authorised booking entity (figure 10). Half of all drivers and vehicles have multiple affiliations, indicating that personalised transport services are being provided with increased flexibility under the new personalised transport framework.

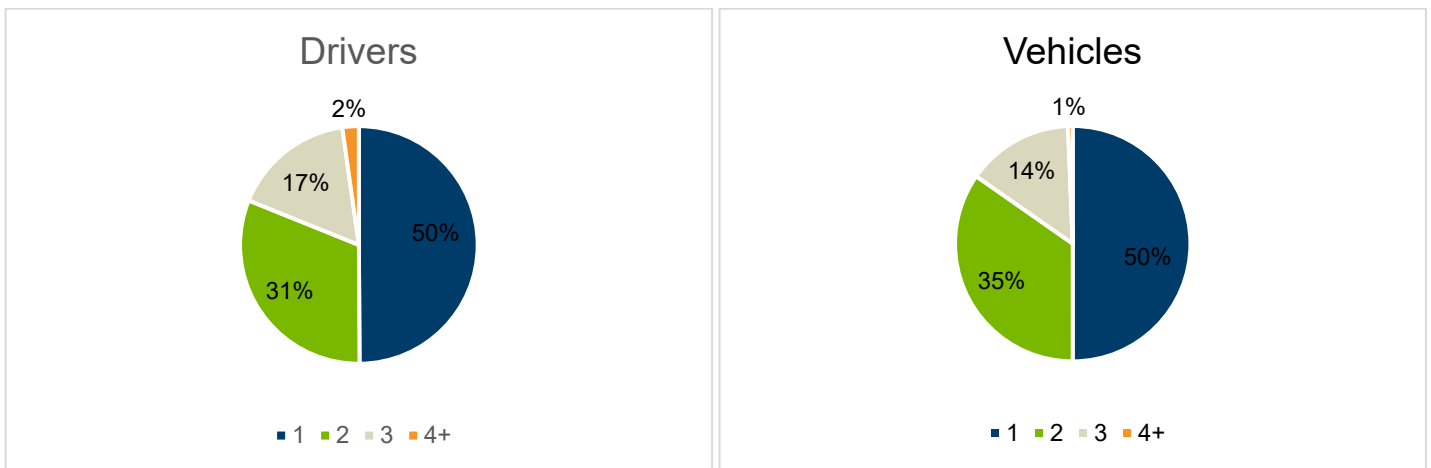


Figure 10: Driver and vehicle booking entity affiliation

Fleet diversity has increased and there are increasing numbers of authorised booking entities with mixed categories of vehicles (currently 8.5 per cent). The majority of authorised booking entities are niche service providers, with 89.5 per cent of entities having a fleet size of 1-5 vehicles and only 3 per cent having a greater fleet size than 50 vehicles. Of course, these few largest providers account for the majority of trips taken.

No new taxi service licences have been issued since the personalised transport reforms. A new taxi service licence framework was introduced as part of the reforms, but a commitment was made not to issue any new taxi licences until at least 2018 to allow the industry to stabilise and to assess the impact of the reforms on taxi service licence holders. Since early 2020, as a result of the impacts of COVID-19 a significant number of existing taxi service licences have not been operational, meaning that there has been no case to issue new taxi service licences at the current time.

Industry sustainability

Concerns have been raised by the taxi industry about the long-term viability of taxi services under the new personalised transport framework. This was identified as a priority issue through the Personalised Transport Industry Reference

³ Note that those booking entities who operate in multiple regions are included for each region in which they operate in figure 9.

Group, with particular concerns about a reduction in income meaning that per car revenue is inadequate as a result of the impacts of competition from ride-booking services and the increased supply of personalised transport services. Whilst increasing patronage across the industry would appear to support a sustainable market, there is a risk that customer trends favouring ride-booking services over taxi services may undermine long-term sustainability of taxi services.

This was reinforced by views of drivers in the Department of Transport and Main Roads' industry surveys. Taxi drivers have a negative outlook about the future viability of the industry, and believe it is harder to make a reasonable income, specifically noting an influx of booked hire drivers which has reportedly impacted job availability and therefore relative income. This was identified an issue primarily in the Brisbane region where the share of the booked hire market is the most diluted. Booked hire drivers have a more positive outlook, but also shared concerns about the future viability of the industry in terms of earning a reasonable income.

In February 2020, 3% of taxi service licences and 19% of limousine licences had no vehicle attached to them and so were not operational, indicating that the taxi and limousine industry had not fully adjusted to the new framework and the impact on passenger volumes as a result of increasing competition. These concerns have been exacerbated by the impact of COVID-19, which has resulted in further reductions in patronage and significantly increased the number of taxi and limousine licences that are not operational.

Licence transfer values have also decreased significantly since the personalised transport reforms (figure 11). These decreases are likely to reflect declining vehicle profitability for taxis and limousines as a result of decreased per-vehicle trip volumes resulting in reduced revenue to offset the costs of providing a service.

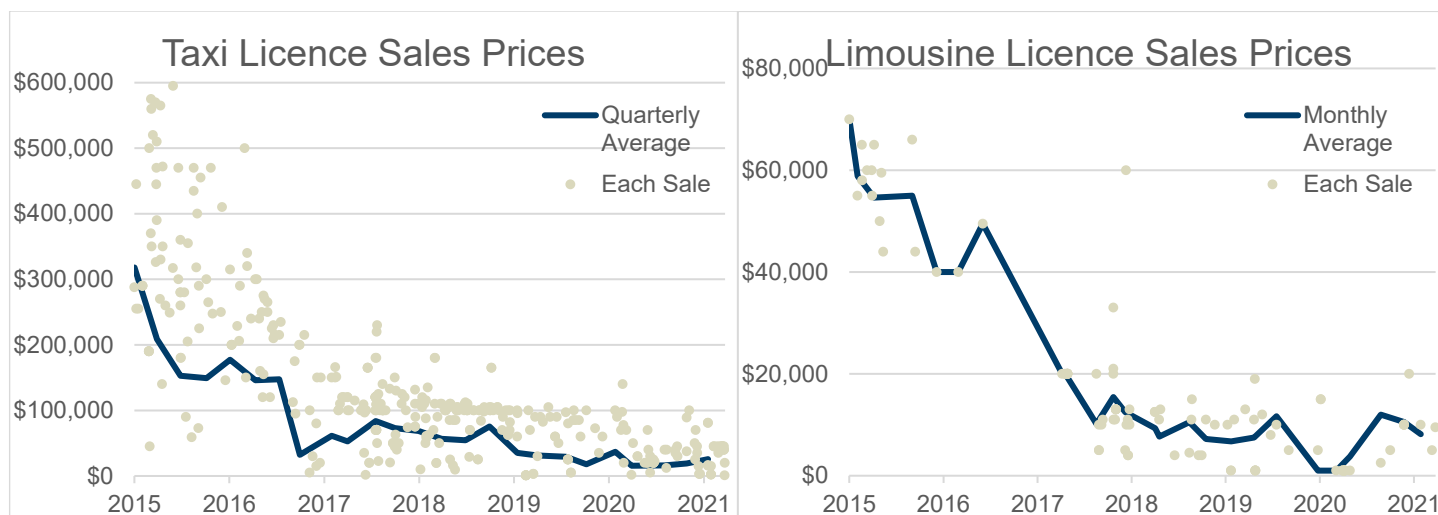


Figure 11: Licence sale prices 2015 – 21

The long-term economic viability of the personalised transport industry, including taxi and limousine services, will depend on its recovery from the impacts of COVID-19. The Department of Transport and Main Roads will review the taxi licensing framework to ensure the approach to issuing taxi service licences supports the taxi industry's ability to compete effectively within the personalised transport industry as it recovers from COVID-19.

Industry fees

A review of licensing fees in the personalised transport sector was undertaken in 2019, to ensure they were set appropriately. The review found that fee revenue was sufficient to cover costs and recommended retaining the current fee structures and levels. The government is not currently planning to alter its approach to industry fees.

Accessibility

Personalised transport services provide vital accessibility options for many people with a disability. The personalised transport reforms prioritised continued support for the delivery of accessible taxi services in Queensland and retained protections to ensure customers have affordable and accessible services.

Surveys undertaken throughout the reforms showed that 75 per cent of were satisfied with wheelchair accessible services. However, customers with a disability rated their access to services that meet their needs and are available when and where they need them as lower than the general population (figure 8, above). Through Stage 3 of the reforms, the Queensland Government has continued to provide support to the taxi industry to improve the provision of accessible services to the community.

Wheelchair accessible taxis

The Queensland Government is focused on supporting a sustainable and modern taxi fleet which can provide accessible services to vulnerable members of the Queensland community. To support this goal, the Government has invested in a \$21 million, four year grant scheme commencing in 2019-20 to support the taxi industry replace aging wheelchair accessible taxis or those written-off by an approved accredited insurance provider, such as due to damage being unable to be repaired or too costly to repair. The scheme also offers funding to replace conventional taxis with new wheelchair accessible taxis in identified taxi service areas, to provide an opportunity to increase the number of wheelchair accessible taxi licences in Queensland. Under the scheme, eligible applicants will receive 50 per cent funding for the cost of a new wheelchair accessible taxi, up to a maximum grant of \$45,000.

As at the end of June 2021, a total of 145 applications for the scheme had been approved, although 14 of these were subsequently withdrawn primarily due to financial pressures in the industry due to COVID-19. 87 of the applications have been finalised and new wheelchair accessible taxis are in operation. Four of the approved applications replaced conventional taxis with wheelchair accessible taxis, increasing the size and capability of the wheelchair accessible taxi fleet.

To improve the provision of wheelchair accessible taxi services to passengers who require a wheelchair to travel, the personalised transport reforms introduced a lift payment of \$20 for each eligible wheelchair accessible taxi trip involving transport of a Taxi Subsidy Scheme member who requires a wheelchair to travel. This was designed to improve service provision for passengers requiring a wheelchair accessible taxi and ensure they have access to reliable personalised transport services by incentivising drivers to prioritise their bookings. During stage 3 of the reforms, the Queensland Government has maintained its commitment to continue to provide the lift payment.

In addition, the Queensland Government financial assistance for the taxi and limousine industry during COVID-19 included an additional incentive of \$1,000 for wheelchair accessible taxi operators to maintain the operation of their vehicles during the pandemic.

Taxi Subsidy Scheme

The Queensland Government has continued to provide the Taxi Subsidy Scheme, which subsidises taxi fares to provide an affordable and accessible transport option for people with a disability who experience profound difficulties using other modes of public passenger transport. Half of the total taxi fare is paid by the scheme, up to a maximum subsidy of \$25 per trip. There is no limit on the number of subsidised taxi journeys a member may take.

The number of journeys taken under the Taxi Subsidy Scheme continued to increase until 2018-19, and has subsequently reduced due to the impact of COVID-19 on individual mobility in the community (figure 12). This indicates that the personalised transport industry has continued to provide accessible service options to people with a disability following the reforms.

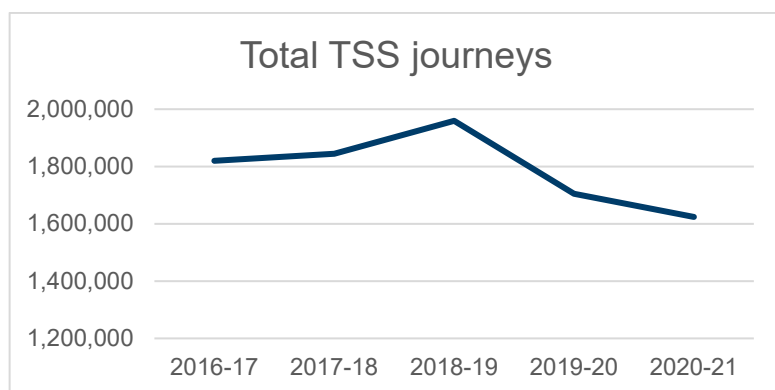


Figure 12: Taxi Subsidy Scheme Journeys

As a result of concerns about the adequacy of transport supports for people with disabilities under the Commonwealth Government's National Disability Insurance Scheme (NDIS), in July 2017 the Queensland Government moved to ensure that NDIS participants continue to have access to the Taxi Subsidy Scheme until 31 October 2022 and adequate support under the NDIS is finalised. Under these interim arrangements, NDIS participants may continue to access full subsidies under the Taxi Subsidy Scheme.

Taxis retained exclusive access to the provision of services to members of the Taxi Subsidy Scheme under the reforms. There are no current plans to extend the Taxi Subsidy Scheme to other personalised transport operators. However, as part of its Disability Action Plan 2018-22, by the end of 2022 the Department of Transport and Main Roads will consider the expansion of the Taxi Subsidy Scheme to include the provision of services by other personalised transport operators.

Customer protections

Maximum fares

The Department of Transport and Main Roads has historically regulated the maximum fare which may be charged for a taxi service due to the market control of taxi licence holders and the relative difficulty for customers to price-shop. During the reforms, and in conjunction with the opening of the market to ride-booking services and requirements for a fare estimate allowing customers to compare fares, this maximum fare cap was removed for booked taxi services. However, maximum fares for rank-and-hail services, Taxi Subsidy Scheme services and wheelchair accessible services continue to be capped to protect vulnerable customers and those less able to compare fares prior to the journey from excessive charges.

The Department of Transport and Main Roads is currently reviewing the level of maximum fares, which have been unchanged since 2014.

Fare estimates

A person who provides a booking service for a booked hire service must provide an estimate of the total fare for the trip before the service commences, unless they have a reasonable excuse. This protects customers by ensuring that there is transparency about the fare, including any additional charges, before the journey commences, and allows them to compare prices to take advantage of the increased choice available in the personalised transport industry.

Broad customer awareness of protections is important to ensure their effectiveness. Despite levels of awareness continuing to rise, in December 2020 only one-half of ride-booking customers and one-third of taxi customers were aware they should receive a fare estimate for booked hire services.

Fewer than half of taxi customers are satisfied with fares (41 per cent), compared with a much higher rate of satisfaction among ride-booking customers (70 per cent).

Advertising prohibitions

It is unlawful for a person to advertise the provision of a service using the words "taxi" or "limousine" (and similar words) unless a taxi or limousine is the vehicle to be used to provide the service. This protects customers and the limousine industry from the risk that a person can advertise a limousine business without holding any limousine licences, thereby potentially seeking commercial advantage by misleading customers into making a limousine booking. The Department of Transport and Main Roads undertakes regular scanning for illegal advertisements relating to taxi and limousine services to enforce this requirement. In the first quarter of 2021, 23 advertisements were investigated leading to the removal of 7 advertisements.

Key findings and next steps

The new personalised transport framework has delivered significant improvements in choice and flexibility for customers:

- Patronage of personalised transport services had increased significantly prior to the impacts of COVID-19.
- Customers have high levels of satisfaction with personalised transport services and high perceptions of the choice and flexibility provided by the industry.
- There have been significant increases in the number of personalised transport industry participants providing a wider range of services and greater choice for customers.

- Continued investment in the delivery of accessible services has supported the taxi industry in modernising its wheelchair accessible taxi fleet to maintain high-quality service delivery for passengers with a disability.

COVID-19 has had significant impacts on patronage within the industry. The long-term impacts and the nature of the industry's recovery remains uncertain. It may result in lasting changes within the industry and to patronage. In addition, the evaluation has also identified concerns within the taxi industry about the impact of the reforms on taxi service licence owners and on the long-term viability of taxi services under the personalised transport industry framework. The Queensland Government is committed to maintaining the benefits of increased choice and flexibility for passengers that have been generated by competition in the industry. The Department of Transport and Main Roads will:

- continue to work with the personalised transport industry to respond to COVID-19
- review the taxi licensing framework to ensure it is supporting the taxi industry's ability to compete effectively within the wider personalised transport industry as it recovers from COVID-19.

The Department of Transport and Main Roads will also maintain a focus on the provision of an accessible personalised transport system and will consider the expansion of the Taxi Subsidy Scheme to include the provision of services by personalised transport operators other than taxis.

Innovation and Customer Service

The personalised transport reforms aimed to provide a regulatory framework that supports innovation and customer service. The Queensland Government has maintained a strong focus on enhancing safety standards in the industry, whilst seeking to provide a regulatory balance to also enable industry innovation by removing nearly 80 pieces of regulation to reduce the overall regulatory burden and allow industry to self-regulate. To achieve this balance, changes as part of the reforms included the:

- streamlining and simplifying of service licence conditions, particularly those relating to high occupancy vehicles and owner-drivers
- removal of maximum age limits for taxis
- removal of regulatory requirements relating to customer service
- removal of the requirement for operator accreditation
- removal of the requirement for taxi service contracts for taxi booking companies
- removal of taxi driver bailment requirements
- introduction of three-month vehicle registration and CTP renewal terms
- capping of electronic payment surcharges at five per cent.

Customer service standards

The rationale behind the simplification of industry regulation was that customer preferences and needs would dictate service standards offered as a result of increased competition. Competition has certainly increased within the industry and evidence shows that the removal of customer service regulation has not led to any perceived deterioration in standards in the industry:

- Survey data indicates that customer perception of personalised transport services has improved. Overall customer satisfaction over the 12 months to May 2021 is high. Over 75 per cent of taxi customers and 86 per cent of ride-booking customers are quite satisfied or very satisfied with their services.
- Customers have retained high levels of satisfaction with customer service factors including cleanliness of the vehicle, service convenience and comfort of the ride.
- Complaints made to the Department of Transport and Main Roads, which are a natural indicator of customer dissatisfaction, are low. The Department of Transport and Main Roads currently receives approximately 25 personalised transport complaints per month, the majority of which relate to industry compliance rather than customer service standards.

The Queensland Government has decided to no longer establish the personalised transport ombudsman role to investigate and facilitate resolution of complaints arising in the personalised transport industry, given that complaint numbers are currently low. The *Personalised Transport Ombudsman Act 2019* was repealed on 9 September 2021. Instead, the Department of Transport and Main Roads has established alternative avenues for the industry to access free and independent mediation services to assist them to resolve complex matters, and has improved information available for complainants about the various processes available to resolve disputes.

Review of driver conditions in the personalised transport industry

The Queensland Government committed to review driver working conditions after the removal of the mandatory requirement for bailment agreements to ensure that standards for driving conditions in the personalised transport industry did not decline as a result of the change.

This review was delivered during stage 3 of the reforms. It found that the majority of taxi and limousine stakeholders engaged as part of the review did not consider that the removal of mandatory bailment conditions has had a significant impact on industry and that there is no evidence that the Department of Transport and Main Roads should seek to play a role in regulating workplace relations. It also found that, while written bailment agreements are still the predominant

agreement in the taxi industry, the types of commercial arrangements now in place across the personalised transport industry are broader than bailment agreements.

A common theme through the engagement was that market conditions are challenging for taxi drivers and operators and that hourly earnings have decreased substantially.

To support drivers in navigating the new personalised transport industry framework, the Department of Transport and Main Roads published the *Industry Guideline: Driver Conditions in the Personalised Transport Industry* in May 2020. It provides high-level guidance on different types of worker and why it matters for drivers to understand their status. It also provides guidance on the different types of agreements in the personalised transport industry, common obligations for drivers who are self-employed businesspersons and where to go for additional information on common queries.

Innovation and compliance

Awareness of the regulatory framework is high within the industry, with more than three-quarters of all groups aware of the updated personalised transport framework. In addition, compliance with the new quarterly data reporting requirements by authorised booking entities has increased significantly since introduction, with over 90 per cent of booking entities having provided quarterly reports for the last two years.

The Department of Transport and Main Roads is aware of innovative service delivery models being developed by industry within the personalised transport framework such as shared rides in the ride-booking sector and development of new app-based options across the personalised transport industry. Around half of drivers surveyed report that they are using new technologies and have improved their use of technology since the reforms.

There is widespread awareness of changes in regulatory processes for vehicle inspection, both the requirement for an annual Certificate of Inspection and the ability to obtain a Certificate of Inspection from an approved inspection station as well as from the Department of Transport and Main Roads. Industry stakeholders have provided anecdotal feedback about the convenience of being able to access approved inspection stations and over 80 per cent of personalised transport vehicles are being inspected at approved inspection stations.

Environmental sustainability

The Department of Transport and Main Roads has released a draft 10-year plan for Queensland passenger transport, *Creating Better Connections for Queenslanders*. One of the priorities under the draft plan is to deliver more sustainable passenger transport options and adopt new, lower emission technologies. By 2030, the goal is for a greener fleet, reducing emissions of buses, taxis, ride-booking and other passenger transport vehicles. The Department of Transport and Main Roads will engage with industry to understand current plans to transition towards lower emission vehicles and what obstacles exist to the deployment of such vehicles in personalised transport fleets.

Key findings and next steps

The simplification of industry regulation has had no adverse impacts on the operation of the personalised transport industry. Customers have maintained levels of satisfaction with the services being delivered and the number of complaints received by the Department of Transport and Main Roads is low.

The Department of Transport and Main Roads is planning to engage with industry stakeholders to understand current plans to transition towards lower emission vehicles.

Industry engagement

The Department of Transport and Main Roads has engaged with industry stakeholders as part of the evaluation of the personalised transport reforms.

The Personalised Transport Industry Reference Group was reconvened in May 2019 and continued to meet in 2019 to provide input and advice relating to the monitoring and evaluation of the personalised transport reform framework during stage 3. The reference group consists of representatives from the taxi, limousine and ride-booking industries as well as disability and driver advocacy groups. The group has also met with the Minister for Transport and Main Roads as required to provide input to the Queensland Government's response to COVID-19.

The Department of Transport and Main Roads has also continued to engage directly with members of the Personalised Transport Industry Reference Group on issues directly affecting them. This has included regular engagement with other personalised transport industry stakeholders, including the Taxi Council of Queensland, Limousine Association of Queensland and the Limousine Action Group.

In addition, TMR has conducted annual personalised transport industry surveys during stage 3 to measure perceptions of the personalised transport framework.

Next steps

The Department of Transport and Main Roads believes that a new industry reference group will be required to move from the reforms into the ongoing regulation of the personalised transport industry. It is important for there to be a cross-cutting industry forum that works in partnership with the Department of Transport and Main Roads to:

- advise the Department of Transport and Main Roads on emerging issues affecting the personalised transport industry to support good customer outcomes and the long-term sustainability of the personalised transport industry. This will include providing an opportunity for regular engagement on the recovery of the industry from COVID-19 and to seek to address any barriers to a strong recovery
- investigate cross-cutting issues affecting the industry and identify options to address challenges
- share best practice approaches to issues that have been adopted across the industry
- provide input on regulatory proposals being considered by the Department of Transport and Main Roads.

The new group will meet regularly, at a minimum of three times per year, and will have a more focussed membership than the current Personalised Transport Industry Reference Group. This reflects the need to have a smaller group to effectively support two-way information sharing and investigations. Membership will be focused on those industry representatives from the taxi, limousine and ride-booking industry that are most closely responsible for the operational delivery of personalised transport services and therefore best placed to work with the Department of Transport and Main Roads to identify and address issues associated with service delivery, which is an approach taken in a number of other jurisdictions. The proposed membership of the group is:

- Department of Transport and Main Roads
- the largest authorised booking entities with more than 200 affiliated vehicles
- Taxi Council of Queensland (representative association for the taxi industry)
- Limousine Association of Queensland and Limousine Action Group (representative associations for the limousine industry)
- Transport Workers' Union.

In completing the evaluation of the personalised transport framework, a number of emerging issues have been identified, on which engagement with the entire industry to provide input and advice will be valuable to supplement direct and targeted engagement with industry stakeholders when required:

- Driver fatigue in the personalised transport industry
- Review the relevance of the security camera risk framework for limousines on the basis of the insignificant number of safety incidents reported in limousines

- Considering issues with the display of multiple booked hire identification signs
- Understanding current industry plans to transition towards lower emission vehicles.

Annual industry and customer surveys of attitudes to the personalised transport framework will continue and will be reported back to the new industry reference group. These surveys will support the Department of Transport and Main Roads' ongoing industry monitoring and allow the development of longitudinal industry trends following the reforms. This will be particularly important in continuing to understand and respond to COVID-19 issues as well as wider trends.

What's Ahead?

Continued adaptation

The evolution of the personalised transport industry in Queensland is part of a much broader global trend. Queensland's personalised transport industry framework has adapted to technological change and is delivering effective services for customers that achieve the objectives of the reforms.

As a result, no significant changes to the personalised transport framework are currently proposed. The Queensland Government will continue to monitor the personalised transport framework and act where indicators in its monitoring and evaluation framework indicate a need for action. In addition, a number of emerging issues have been identified, which will be reviewed to ensure the personalised transport framework continues to deliver safe and positive outcomes for customers, industry and the community.

Personalised transport industry plan

The Department of Transport and Main Roads has identified the following plan to support the continued adaptation of the personalised transport framework:

Objective	Planned activities
Safety standards	<ul style="list-style-type: none">- Undertake chain of responsibility audits to ensure compliance with key safety duties and gain further insight into any areas of non-compliance.- Complete a detailed review of the evidence relating to driver fatigue in the personalised transport industry to investigate the effectiveness of the current regulatory and operational approaches and identify whether it is necessary to impose additional regulatory requirements.- Complete a review of the Secure Rank Program to assess whether it is effectively delivering improved safety outcomes that support the delivery costs.- Review the relevance of the security camera risk framework for limousines on the basis of the insignificant number of safety incidents reported in limousines.- Investigate concerns about vehicle identification requirements by considering banning potentially misleading number plates; and engaging with industry to consider issues with displaying multiple booked hire identification signs.
Choice and flexibility	<ul style="list-style-type: none">- Continue to work with the personalised transport industry to respond to COVID-19;- Review the taxi licensing framework to ensure it is supporting the taxi industry's ability to compete effectively within the personalised transport industry as it recovers from COVID-19.- Consider the expansion of the Taxi Subsidy Scheme to include the provision of services by personalised transport operators other than taxis.
Innovation and customer service	<ul style="list-style-type: none">- Engage with industry stakeholders to understand current plans to transition towards lower emission vehicles.
Industry engagement	<ul style="list-style-type: none">- Establish a new personalised transport industry reference group to share best practice and work collaboratively to consider solutions to common issues affecting the industry.- Continue to monitor attitudes to the personalised transport framework through annual industry and customer surveys.

